



TRI-VALLEY ESTATE PLANNING COUNCIL

Mar 2011

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President's Message

A special thanks to our members who are consistently inviting guests to join us for our dinner meetings. This is helping your TVEPC to grow both in size, and reputation. Yes, our numbers are growing, and the word is getting out that TVEPC provides not only quality continuing education presentations for all estate planning practitioners, but also has a membership that enjoys networking, and having fun while learning. This was certainly evidenced at our February meeting as members lingered for some time following the presentation for even more conversation. Of course, our dear Hospitality Director Dick Warga's maintaining the tradition of having a bottle of wine as a raffle prize for a lucky attendee only enhances the enjoyment of the evening.

So, on March 3rd, your TVEPC will once again convene at the Pleasanton Marriott for what promises to be another enlightening, and enjoyable evening. We are most fortunate to have attorney Margaret Hand as our presenter on a subject of increasing importance for estate planners that is infrequently discussed. One of the reasons characterization of marital property is not usually a front burner issue is that it can be somewhat confusing, and certainly a sensitive issue for couples with previous marriages. Thus, you will not want to miss Margaret's wit and wisdom, as she helps us understand that the phrase "character matters", has more than one application...

Again, you will most definitely want to invite a guest to our March meeting, and hopefully arrive by 6 p.m. so you can enjoy visiting with new and old members, and guests, prior to being seated for dinner. See you at the Marriott.

“Marital Agreements, the Third Rail of Estate Planning?”

Many married couples and registered domestic partners avoid talking about the character—separate or community—of their property. Yet characterization impacts lifetime gifts, post-death trust administration, and any plan that includes QPRTs, ILITs, GRITs or GRATs. For that reason, a couple's estate planner may be the first professionals to raise this challenging topic. Estate planners must understand how marital property is characterized, as well as how character may be transmuted. In this lively talk, **Margaret M. Hand, Esq.**, will remind us of when and why character matters, how to clarify character and what to do when the clients' plan requires a marital agreement. Join us next month to learn more.

Join us on:

Thursday, March 3, 2011

at the

Marriott Pleasanton

6:00 PM Wine and Registration
6:30 PM Dinner

**\$35 Preregistration
\$40 after Feb 28th**

Reservations and cancellations need to be made by February 28th to be assured of a space

Send a check to the council office today
781 McKean Place Concord, CA 94518

or

by credit card. click below.

<https://123signup.com/calendar?org=tvepc>

Meeting Sponsored By:

**Steve Turner
Bonhams and Butterfields
220 San Bruno Avenue
San Francisco, CA 94103
415.503.3222**

**April's Meeting will be with the
Estate Planning Council, Diablo Valley
Wednesday, April 20, 2011
Lafayette Park Hotel**